



## **Job Profile**

**ERS Job Title: Retirement Benefits Specialist I**

**Division: Member Services**

### **Internal Job Profile Summary**

Reviews, analyzes and processes basic retirement related transactions using applicable laws, rules, and program regulations to determine benefit eligibility. Prepares documents initiating benefit processing, compiles reports and program documentation, and responds to customers, including employees, retirees, beneficiaries, and employers.

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### **Job Responsibilities & Performance Standards**

- Performs work relating to the examination and processing of retirement benefits
  - Monitors member and retiree accounts to ensure timely processing and compliance with rules and regulations
  - Responds to requests from customers, including members, retirees, beneficiaries, and employers regarding requirements, returned/denied benefits, program eligibility and/or interpretation of federal and state laws
  - Assembles data and completes benefit calculations within established guidelines
  - Prepares documents initiating retirement benefit processing
  - Processes and maintains applications and records, and reconciles accounts related to retirement benefits
  - Provides assistance with the resolution of retirement benefit disputes
  - Tracks/monitors benefit processing related activity
  - Gathers and compiles data and prepares reports
  - Records retirement benefit transactions within PARIS
  - Categorizes retirement processing and maintains appropriate files
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### Technical Competencies Required for Job

<b>Regulations, Laws, and Plan Provisions</b>	▪ Has a basic understanding of the regulations and laws that govern the plans
	▪ Ability to comprehend the pension plan handbooks
<b>Pension Software</b>	▪ Ability to navigate basic screens and perform data entry in PARIS (or similar pension software)
	▪ Ability to locate and communicate to others basic information from within PARIS (or similar pension software)
<b>MS Office</b>	▪ Has a basic understanding of MS Office
	▪ Ability to navigate and perform data entry in MS Office
<b>Benefits Administration Processes</b>	▪ Ability to complete core transactions

## Statewide Core Behavioral Competencies Required for Job

<b>Basic Level Competencies</b>	
Basic understanding or knowledge needed for the job; Basic understanding and knowledge sufficient enough to handle routine tasks; Requires some guidance or supervision when applying the competency; Understands and can discuss terminology and concepts related to the competency.	
<b>Accountability</b>	Accepts full responsibility for self and contribution as a team member; displays honesty and truthfulness; confronts problems quickly; displays a strong commitment to organizational success and inspires others to commit to goals; demonstrates a commitment to delivering on his/her public duty and presenting oneself as a credible representative of the Agency and State to maintain the public's trust
<b>Customer Service</b>	Understands that all State employees have external and/or internal customers that they provide services and information to; honors all of the State's commitments to customers by providing helpful, courteous, accessible, responsive, and knowledgeable service
<b>Judgment and Decision Making</b>	Analyzes problems by evaluating available information and resources; develops effective, viable solutions to problems which can help drive the effectiveness of the department and/or State of Georgia
<b>Results Orientation</b>	Consistently delivers required business results; sets and achieves achievable, yet aggressive goals; consistently complies with quality standards and meets deadlines; maintains focus on Agency and State goals
<b>Teamwork and Cooperation</b>	Cooperates with others to accomplish common goals; works with employees within and across his/her department to achieve shared goals; treats others with dignity and respect and maintains a friendly demeanor; values the contributions of others

## Additional Behavioral Competencies Required for Job

<b>Basic Level Competencies</b>	
Basic understanding or knowledge needed for the job; Basic understanding and knowledge sufficient enough to handle routine tasks; Requires some guidance or supervision when applying the competency; Understands and can discuss terminology and concepts related to the competency.	
<b>Communication</b>	Respectfully listens to others to gain a full understanding of issues; comprehends written material; presents information in a clear and concise manner orally and in writing to ensure others understand his/her ideas; appropriately adapts his/her message, style, and tone to accommodate a variety of audiences
<b>Cultural Awareness</b>	Demonstrates an open-minded approach to understanding people regardless of their gender, age, race, national origin, religion, ethnicity, disability status, or other characteristics; treats all people fairly and consistently; effectively works with people from diverse backgrounds by treating them with dignity and respect
<b>Flexibility</b>	Adapts to change and different ways of doing things quickly and positively; does not shy away from addressing setbacks or ambiguity; deals effectively with a variety of people and situations; appropriately adapts one's thinking or approach as the situation changes
<b>Initiative</b>	Proactively identifies ways to contribute to the State's goals and missions; achieves results without needing reminders from others; identifies and takes action to address problems and opportunities
<b>Organizing*</b>	Able to keep projects moving toward completion; able to keep track of many things that must be done within a given timeframe; able to act according to priorities; able to balance workload demands
<b>Professional Development</b>	Demonstrates a commitment to professional development by proactively seeking opportunities to develop new capabilities, skills, and knowledge; acquires the skills needed to continually enhance his/her contribution to the State and to his/her respective profession

\*Additional competency required for job but not included in the State's predefined competency list.

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### Statewide Entry Qualifications

Bachelor's degree in business, accounting or finance from an accredited college or university.

### ERS Preferred Qualifications

Bachelor's degree OR Four years of job related experience working in pension plans, finance or accounting.

### ERS Career Development Criteria

- Retirement Specialist II
- Retirement Specialist III
- Retirement Specialist Supervisor

**Work Environment**

This is a general office environment consisting of cubicle desk space. Ambient room temperatures, lighting and traditional office equipment are provided as found in a typical office environment.

**Physical Demands**

Individuals working in this job are required to multi-task while seated. This includes answering phones calls, research information and type using computers throughout the workday; may require walking primarily on a level surface for periodic periods through-out the day; reaching above shoulder heights, below the waist or lifting as required to file documents or store materials throughout the work day; also may include lifting up to 25 pounds for files, computer printouts on occasion.